Maintain Tax Deductions Training

Table of Contents

Using this Training Manual

When you attend HRIS Training, this manual will be used to outline the process. In the class you will learn specifics on how to process an individual action.

After training, additional resources can be found on the HRIS Website, including a link to Self Directed Help. This section of the training manual will provide an outline of the naming conventions and setup/flow of the training material.

Text Conventions

The manual is setup using standard text conventions and distinct visual elements to make training easier to follow.

Format	Meaning
Bold	Name of a Form/Field. A manual title. An emphasized word/phrase. A placeholder for a user-defined value.
Italics	A key name. For example, Shift and Enter are key names.

Visual Elements

Visual elements are provided for certain types of information to draw your attention to that element/concept. NOTE: Not all ''elements'' may be included in this manual.

Format	Meaning
	Tip – provides miscellaneous information about facts that might be of interest to you as you complete the process.
	Warning or Important Note – provides critical points or items that you must address as you complete the process.
	Exercise – indicates an Exercise.

Screen Captures

Screen Captures are provided prior to each Task Step Chart. The capture will identify the Form Name and Form Number according to the task. The numbers identified on the screen capture correspond to the numbered tasks in the chart.

Example:

Task Step Chart

The Task Step Charts are set up to easily identify each necessary step taken with follow through explanation to make training easier to follow.

Format	Meaning
Number Column	This number identifies, on the screen capture, the order the steps are to be taken (in sequence)
HRIS FIELD	This identifies the field on the form that your action is required.
R/O	This will tell you if the field you are working on is a **R**equired field or an **O**ptional field.
Step/Action	This will identify what needs to be entered in the current field.
Expected Result	This will identify the result of your current action taken. If the task step chart is blank, make sure to always check the lower left hand corner of your screen for messages from HRIS.
Notes/Additional Information	This will identify Warning or Important Note – provides critical points or items that you must address as you complete the process.

HRIS Basics

HRIS has a number of standard features that work the same regardless of the field you are on in the system.

HRIS Forms

➢ HRIS Forms will always open with the fields blank.

➢ When navigating in HRIS, you can move from field to field by pressing the Tab button on your keyboard, or clicking your mouse in each new field.

➢ You must then type or select from a drop down menu the items you want to fill into your fields. If you transfer from another HRIS form, some of the data from the previous form (ex. Company and Employee EIN) will fill in those same data items on the new form.

Completing Fields on HRIS Forms
There are key fields, which are required on HRIS Forms.

➢ All information should be entered in CAPITAL LETTERS.

Name: | ANDREW

➢ Do not use punctuation.
➢ Address 1: | 456 ARROWHEAD LN
➢ Phone numbers are input with periods. (602.111.1111)
➢ Information is Added/Changed/Inquired on using the navigation bar. You can also use the buttons Next/Previous to move between Employee records.

| Add | Change | Delete | Inquire | Next | Previous |

HRIS System Messages

➢ Always check the bottom left corner of a form for system messages such as "Add Complete-Continue."

➢ HRIS has built in edits to validate information. For example:
  o The Social Security Number is checked by HRIS to see that it is in the correct format and it does not already exist.

Introduction

An Employee will have taxes withheld from his/her pay on a biweekly basis. These withholdings include:

- Federal
- State of Arizona
- FICA
- Medicare
- MQGE (where applicable),
- Earned Income Credit (where applicable).

Employee tax withholdings will default as defined by Federal/State Laws. However, an Employee must complete the required legal documents (W-4, W-5, and A-4) to add or change tax withholdings. Employee taxes will be set up on the *Employee US Taxes Form (PR13.1)*.

Agency Human Resources and Payroll Initiators both have access to enter Federal and State tax information. **If the tax change involves starting or stopping MQGE or Earned Income Credit tax withholdings, these updates must be sent to the Agency Payroll Initiators for processing**.

Once an Employee's taxes have been updated, you should file the applicable W-4 and A-4 form as determined by your agency.

Employee US Taxes Entry Tips

- Unlike may other HRIS Transactions, changes to an Employee's tax withholdings cannot be future dated.
- Changes can be made to the Employee taxes at any time, and these changes will be reflected on the next manual payment (handwrite) or regular payroll.
- Changes are effective in HRIS immediately.
- The State of Arizona does not withhold taxes for other states.
- An Employee who is rehired must complete new tax forms and his/her record must be updated in HRIS. If not, all previous withholdings will be reinstated.

Employee US Taxes Form (PR13.1)

Steps for Both Federal and State Withholdings Update

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type PR13.1 in the White Search Box. Press *Enter* on the keyboard	The Employee US Taxes Form (PR13.1) will open.	
2	**Company** field	R	If field is not **Company** '1', Type or Select '1'.	Field should default to Company '1'	Company should always be '1'
3	**Employee** field	R	Type the Employee's EIN.	EIN will appear. Employee's name is displayed next to the field after cursor is moved to the next field.	You must enter the correct EIN.
4	**Inquire** button	R	Click **Inquire**.	If the Employee is new to the State – HRIS displays the defaults as setup for the Employee. If the Employee is current or has previously worked for the state – HRIS displays the last values stored for the Employee.	You must always verify that the selections displayed on this form (PR13.1) match the signed W-4 for federal taxes and the signed A-4 for state taxes. After comparing the information, you must complete one of the following steps: • If information matches, no additional processing is required. OR • If information does not match, continue with the steps outlined in this document to change Federal/State Taxes. Next step will be Step 5 (Page 7) OR • If Employee indicated that he/she is exempt from taxes you must turn on the Exempt flag, skip to Step 8 (Page 8). In addition, you must verify that the Employee is not requesting EIC or MQGE. If the Employee is requesting this special tax status, you must forward documentation to the Agency Payroll Office for processing.
5	**Resident Section** **State** Field **County** Field **City** Field **Sch Dst** Field	R	**State** Field – should default to AZ. **County** Field –will remain blank **City** Field –will remain blank **Sch Dst** Field –will remain blank.	Fields will display as defined in Step/Action column.	Resident State field should default to 'AZ'

Maintain Tax Deductions Training 7

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
			Do NOT change any of these setups.		
6	**Work Section** **State** Field **County** Field **City** Field **Sch Dst** field	N / A	**State** Field – should default to AZ. **County** Field –will remain blank **City** Field –will remain blank **Sch Dst** Field –will remain blank. Do NOT change any of these setups.	Fields will display as defined in Step/Action column.	Work State field should default to 'AZ'
7	**Workers Comp State** field **EIC Status** field **BSI Group Code** field	N / A	**Workers Comp State** Field - should default to AZ. **EIC Status** Field – will remain blank **BSI Group Code** – information will appear if applicable to the Employee. Do NOT change any of these setups	Fields will display as defined in Step/Action column.	Workers Comp State should default to 'AZ' EIC Status – Field used by Agency Payroll in the starting/stopping of EIC. 🛑**Notes** • If you will be changing either Federal or Federal/State Taxes, continue with section 'Additional Steps for Federal Withholdings Update' – Page 8. • If you will be only changing State taxes, skip to section 'Additional Steps for State Withholdings Update' – Page 11

Additional Steps for Federal Withholdings Update

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
8	**FC** field – Row 1	R	Type 'C' in the FC field to change the Federal withholding data.		The 'C' should be next to the Ded Code 'T101' to update Federal Withholdings
9	**Ded** field	R	Field should default to 'T101'. No Action Required	Field contains 'T101'.	
10	**Res** field	R	Field should default to 'Y'. If field is not 'Y' - Type 'Y' or select Resident from the drop down in the Res field.	'Y' appears in the field.	
11	**Mar Sts** field	R	Select the Marital Withholding		Available options for selection are:

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
			status as indicated on the Employee's W-4.		• 01 – Single • 02 – Married • 15 – Married withhold at single
12	**Exemp Number** field	R	Type the number of dependents claimed by the Employee		After completing the Exemp Number field you can do one of the following: • If the Exemp Number field is the only change, skip to Step 17 (Page 8). No other fields must be entered. OR • If the Employee wants an Additional Amount withheld, continue with Step 13 (Page 9). 🛑**Notes** • You cannot have a number in 'Exemp Number' and have a Y in 'Tax Ex'. If the Employee is claiming Tax Exempt, do not place a number in this field. **Exempt Amount** Field is not used at the State of Arizona. Field should be blank.
13	**Tax Ex** field	O	Type 'Y' or Select 'Yes – Exempt Tax Only' from the drop down menu if the Employee is Exempt from taxes.		🛑**Notes** • If this field is 'Y', the Employee will have no taxes withheld from his/her pay. ○ You should only add a 'Y' in this field if the Employee has marked Exempt on his/her W-4 Form. • If the Employee has not marked Exempt, you should leave this field blank. **Cert Code** field is not used at the State of Arizona. Field should be blank..
14	**Addl Tax Info** Tab	O	Click on the Addl Tax Info Tab if adding Additional Amounts	The Addl Tax Info Tab opens, displaying additional fields.	🛑**Notes** • Addl Exemptions and Effective Dates Tabs are not used by the State of Arizona.

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
					The Addl Tax Info Tab is only used if the Employee has entered an additional dollar amount to be withheld on his/her Form W-4. If not, skip to Step 17 (Page 10)
15	**Tax Code** field	O	Enter Tax Code '2' or Select 'Additional Amount' from the drop down menu.		**Rate** field is not used at the State of Arizona. Field should be blank.
16	**Amount** field	O	Enter Additional Tax Amount		Amount cannot exceed: 9999999.99

DO NOT SELECT A BSI FORMULA. THIS FIELD IS FOR STATE TAXES ONLY. |
| 17 | **Change** button | R | If no changes are required to State Taxes, Click Change.

If changes are being made to State Taxes, continue with section ' Additional Steps for State Withholdings Update' (Page 11). | Message "Change Complete – Continue" will appear in the lower left corner of the window. | |

Additional Steps for State Withholdings Update

Additional Steps for State Withholdings Update

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
18	**FC** field – Row 2	R	Type 'C' in the **FC** field to Change the State withholding data.		The 'C' should be next to the Ded Code 'T201' to update State Withholdings
19	**Ded** field	R	Field should default to 'T201'. No Action Required	Field contains 'T201'.	
20	**Res** field	R	Field should default to 'Y'. If field is not 'Y' - Type 'Y' or select Resident from the drop down in the Res field.	'Y' appears in the field.	
21	**Mar Sts** field	R	Select the Marital Withholding status that matches the Federal Withholdings.		Mar Sts field for State should always match what is defined in the Federal Taxes row. **Exemp Number** Field is not used for State Taxes. Field should be blank. **Exempt Amount** field is not used at the State of Arizona. Field should be blank. **Tax Ex** field is not used for State Taxes. Field should be blank. **Cert Code** field is not used at the State of Arizona. Field should be blank.
22	**Addl Tax Info** Tab	R	Click on **Addl Tax Info** Tab if it is not displayed. If tab is displayed, skip to next step.	The Addl Tax Info Tab opens, displaying additional fields.	Addl Exemptions and Effective Dates Tabs are not used by the State of Arizona.
23	**BSI Formula** field	R	Enter the correct BSI Formula		**Tax Code** field is not used for State Taxes. Field should be blank. **Rate** field is not used for State Taxes. Field should be blank. **Amount** field is not used for State Taxes. Field should be blank. Valid Values are:

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
					• 2 • 3 • 4 • 5 • 6 • 7 • 8 Please refer to the GAO Publication, "Tables for Percentage Method of Withholding", to determine the applicable rates for these valid values.
24	**Change** button	R	Click Change	Message "Change Complete – Continue" will appear in the lower left corner of the window.	